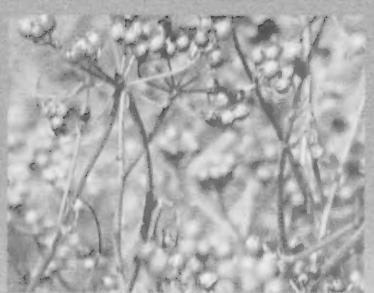
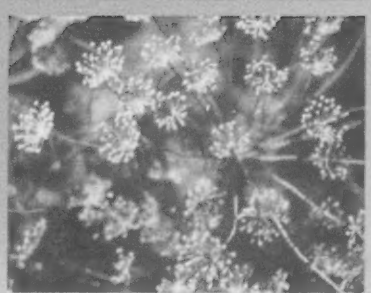
2012 SPECIALTY CROP REPORT

STATISTICS

AGRICULTURE





Saskatchewan
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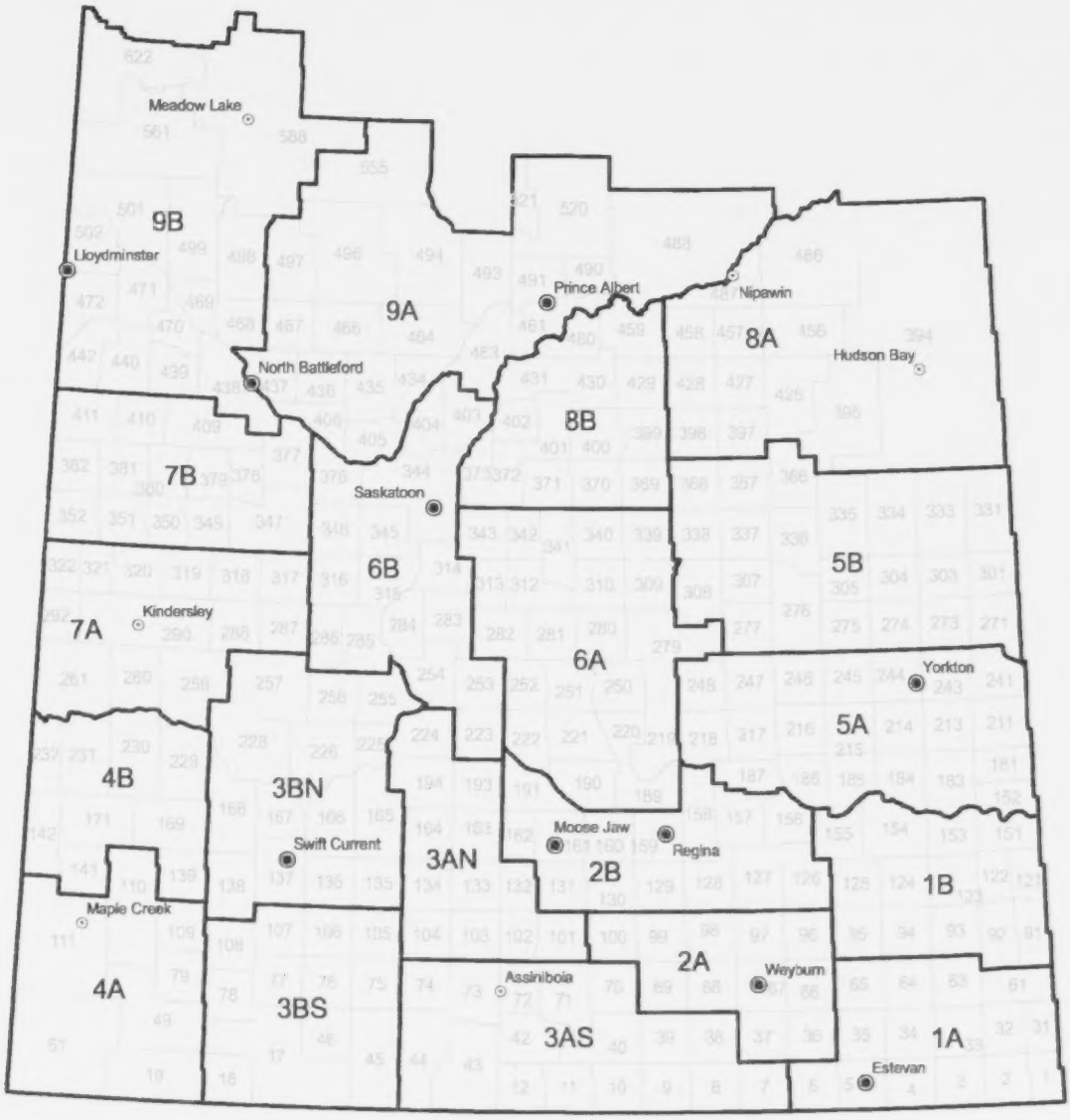
Saskatchewan Crop Districts



Acknowledgements

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Further information may be obtained by contacting:

Saskatchewan Ministry of Agriculture
Policy Branch
Room 302 - 3085 Albert Street
Regina SK S4S 0B1
Phone: (306) 787-5947
Fax: (306) 787-5134

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2012 Specialty Crop Report

Summary

Last winter was fairly mild and there was not enough snow runoff in many parts of the province to provide sufficient moisture at seeding time. Parts of the west-central and southwestern regions had poor stubble subsoil moisture going into winter and there were concerns of drought-like conditions in the spring. Large amounts of precipitation fell in the months of April and May, helping to alleviate some of these concerns in the west. In the east excess moisture hindered seeding. However, most producers were able to seed and harvest a crop this year. For many in the southeast, it was the first time in several years that a crop was seeded.

Many producers were able to start seeding around the end of April, and, by the first week of May, five per cent of the crop was seeded. Field conditions were better than they had been for several years in many parts of the province, and seeding quickly progressed once the rain stopped. By June 18, 98 per cent of the crop had been seeded, compared to just 82 per cent at the same time in 2011.

It was a difficult year for many crops, as flooding, heat stress, diseases, insects, wind and hail affected the whole province. The eastern side dealt with excess moisture for the majority of the year while the south dealt with high temperatures and heat stress. By mid-July, hail insurance claims were twice the average and the number continued to rise throughout the growing season.

Diseases were present in the majority of crops this year with canola affected the most. For the most part, insect damage was minimal in many areas, although there were pockets of the province that had more damage from wheat midge, diamondback moths

Figure 1: Area, Yield, and Production of Specialty Crops, Saskatchewan

	2012				2011			
	Area		Yield	Production	Area		Yield	Production
Crop	Seeded	Harvested		'000	Seeded	Harvested		'000
	acres		kg/ha	tonnes	acres		kg/ha	tonnes
Brown Mustard	65.0	65.0	851	25.1	90.0	90.0	953	38.9
Yellow Mustard	130.0	130.0	677	39.9	100.0	95.0	793	34.2
Oriental & Non-specified Mustard	45.0	45.0	867	17.7	75.0	70.0	948	30.1
Total Mustard	**240.0**	**240.0**	**760**	**82.7**	**265.0**	**255.0**	**892**	**103.2**
Large Green Lentils	1,200.0	1,180.0	1,293	691.9	1,035.0	985.0	1,302	581.5
Small Green Lentils	260.0	255.0	1,364	157.8	200.0	195.0	1,273	112.6
Red Lentils	900.0	870.0	1,324	522.6	1,165.0	1,125.0	1,436	733.0
Other Lentils	70.0	70.0	1,100	34.9	60.0	55.0	1,118	27.9
Total Lentils	**2,430.0**	**2,375.0**	**1,306**	**1,407.3**	**2,460.0**	**2,360.0**	**1,359**	**1,455.0**
Green Peas	300.0	290.0	1,698	223.2	263.0	260.0	1,956	230.7
Yellow Peas	2,000.0	1,940.0	1,704	1,496.9	1,415.0	1,405.0	2,238	1,426.1
Other Peas	25.0	20.0	1,500	13.6	22.0	20.0	1,578	14.3
Total Peas	**2,325.0**	**2,250.0**	**1,698**	**1,733.7**	**1,700.0**	**1,685.0**	**2,184**	**1,671.1**
Desi Chickpeas	n.a.			n.a.	n.a.			n.a.
Kabuli Chickpeas	160.0	155.0	1,779	125.1	65.0	63.0	1,643	46.9
Total Chickpeas	**180.0**	**175.0**	**1,781**	**141.3**	**105.0**	**103.0**	**1,610**	**75.2**
Hairless Canaryseed	110.0	105.0	951	45.3	105.0	105.0	1,029	49.0
Regular Canaryseed	190.0	180.0	975	79.6	170.0	165.0	1,064	79.6
Total Canaryseed	**300.0**	**285.0**	**966**	**124.9**	**275.0**	**270.0**	**1,050**	**128.6**
Triticale	**20.0**	**15.0**	**2,425**	**16.5**	**30.0**	**15.0**	**1,499**	**10.2**
Dry Beans	**11.0**			**n.a.**	**9.0**			**n.a.**
Caraway	**6.5**			**n.a.**	**8.1**			**n.a.**
Coriander	**15.5**			**n.a.**	**16.0**			**n.a.**
Camelina	**0.7**			**n.a.**	**0.7**			**n.a.**
Borage	**4.2**			**n.a.**	**1.7**			**n.a.**
Hemp	**19.0**			**n.a.**	**5.9**			**n.a.**
Fababeans	**6.0**			**n.a.**	**15.0**			**n.a.**
Soybeans	**68.0**			**n.a.**	**10.0**			**n.a.**
Fenugreek	**1.0**			**n.a.**	**0.6**			**n.a.**
Buckwheat	**4.0**			**n.a.**	**4.0**			**n.a.**
Total	**5,630.9**	**5,340.0**		**3,506.4**	**4,906.0**	**4,688.0**		**3,443.3**

Source: Statistics Canada and Saskatchewan Ministry of Agriculture

and grasshoppers. Bertha armyworm numbers were high in many areas of the province, particularly on the western side. There were many reports of crop dusters working overtime to get fields sprayed before damage worsened.

The province received a lot of rain during early-to-mid June and again in mid-July. Many areas reported more than two inches of rain each time and some areas reported four inches or more. The Tisdale region received 112 mm in a matter of hours on July 18, flattening many crops in the area. Producers in some northern regions reported that many fields and roads could not support equipment and there were many ruts left in fields that needed to be worked this fall.

According to Crop Report records, the Tisdale area received the largest amount of cumulative rainfall in the province from April 1 to mid-October at 636 mm. The Nipawin area came in second at 579 mm and the Battleford area third with 556 mm. The least amount of cumulative rainfall for the province was recorded around the Gainsborough area (181 mm). The Bengough area recorded 187 mm, while the Radville area recorded 193 mm.

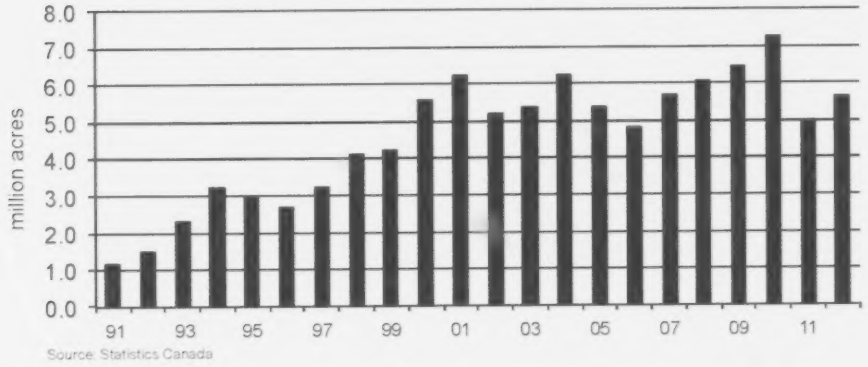
Hot and dry weather in fall allowed producers to harvest the 2012 crop in mostly good condition.

Saskatchewan farmers planted more acres of specialty crops in 2012, at 5.6 million, up by 15 per cent from 2011, as detailed in Figure 1 and shown in Figure 2. The crops that decreased in acreage from 2011 were brown mustard, oriental mustard, red lentils, triticale, caraway, coriander and fababeans. All other seeded acreage increased from 2011.

In aggregate, 2012 specialty crop production was higher than in 2011, and producers harvested crops of generally above average quality. Production of all specialty crops is estimated at 3.5 million metric tonnes (mmt), up two per cent from 2011 production of 3.4 mmt. Aggregate production of the specialty crops may be seen in Figures 1 and 3. Production of Kabuli chickpeas more than doubled from 2011, triticale production was up more than 60 per cent, and production of small green lentils was up more than 40 per cent.

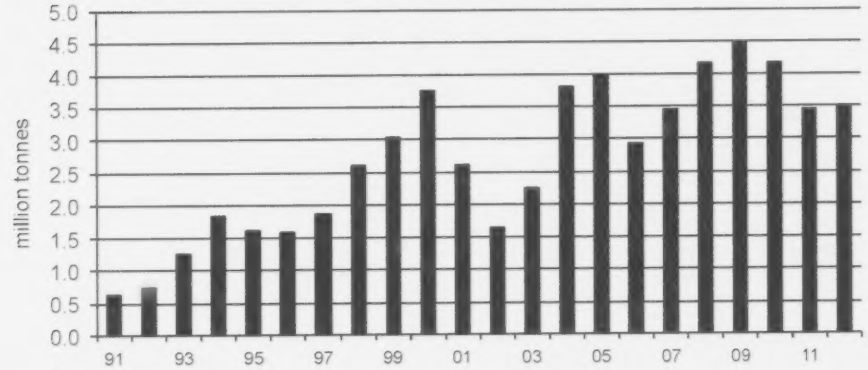
Provincial yields for all specialty crops in 2011 and 2012 are listed in Figure 1. Small green lentils, Kabuli chickpeas, and triticale showed yield increases from 2011. Yellow peas showed the largest yield decline from 2011 with a decrease of 24 per cent.

Figure 2: Saskatchewan Specialty Crop Seeded Area, 1991-2012



Source: Statistics Canada

Figure 3: Saskatchewan Specialty Crop Production, 1991-2012



Source: Statistics Canada

Peas

For 2012, the estimated total pea production in Saskatchewan is 1.7 mmt, which is up four per cent from 2011 production. The change in pea production was a result of an increase in harvested acres by one third as yields were lower than in 2011. In 2012, the estimated seeded area for all peas was 2.3 million acres, up 37 per cent from a year earlier. The provincial pea yield in 2012 averaged 1,698 pounds per acre (28.3 bu.), down 22 per cent from the 2011 pea yield, and six per cent below the 10-year provincial average. In 2012, the pea crop is expected to grade 88 per cent in the top two grades, compared to a 10-year average of 83 per cent. A summary of the production and prices for all peas in the past ten years is shown in Figure 4.

Figure 5 shows the acres seeded to peas by crop district in 2011. The data is not yet available by crop district for 2012. Districts with the highest seeded acres in 2011 were 3bn with 212,934, 7b with 162,811 and 3as with 147,717 seeded acres. Crop District 6a was in the top three in 2011 instead of 7b.

Green Peas

Saskatchewan green pea production is estimated to be 223,200 tonnes in 2012, down three per cent from 2011. The green pea harvested acres increased by 11 per cent from 2011. Yields averaged 1,698 pounds per acre, down 13 per cent from 2011.

Figure 4: Pea Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (bu/acre)	Production (tonnes)	Average Price ($/tonne)
2002/03	2,135	18.3	881,800	209
2003/04	2,145	22.5	1,292,700	167
2004/05	2,375	36.2	2,291,500	139
2005/06	2,550	34.0	2,313,400	121
2006/07	2,430	28.7	1,861,500	166
2007/08	2,925	29.5	2,309,600	258
2008/09	3,165	32.5	2,725,600	251
2009/10	2,875	33.8	2,612,700	196
2010/11	2,610	29.8	1,973,100	234
2011/12	1,700	36.4	1,671,100	314
2012/13	2,235	28.3	1,733,700	

Source: Statistics Canada

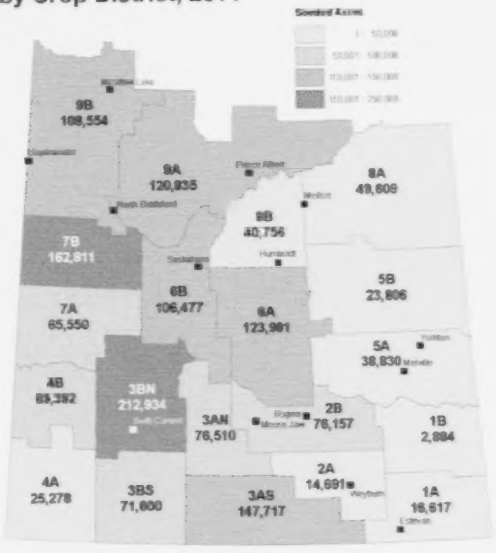
The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was $295 per tonne. The spot price fell in August, rose to $331 per tonne by early October, fell to $319 per tonne in late October, generally rose to $401 per tonne by late May and was at $371 per tonne by the end of July 2012. The cash/spot price for the past three crop years is shown in Figure 6.

Yellow Peas

Saskatchewan yellow pea production is estimated to be 1.5 mmt in 2012. Production is up five per cent from 2011 levels. The yellow pea harvested area increased by 38 per cent from 2011. The yields averaged 1,704 pounds per acre, down 24 per cent from 2011.

The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was $318 per tonne. The spot price fell in August, generally rose to $328 per tonne in September, dropped to $297 per tonne in late January, varied to a high of $322 per tonne in late March, then varied, reaching a high of $346 per tonne in mid-June, then fell and was at $303 per tonne by the end of July 2012. The cash/spot price for the past three crop years is shown in Figure 6.

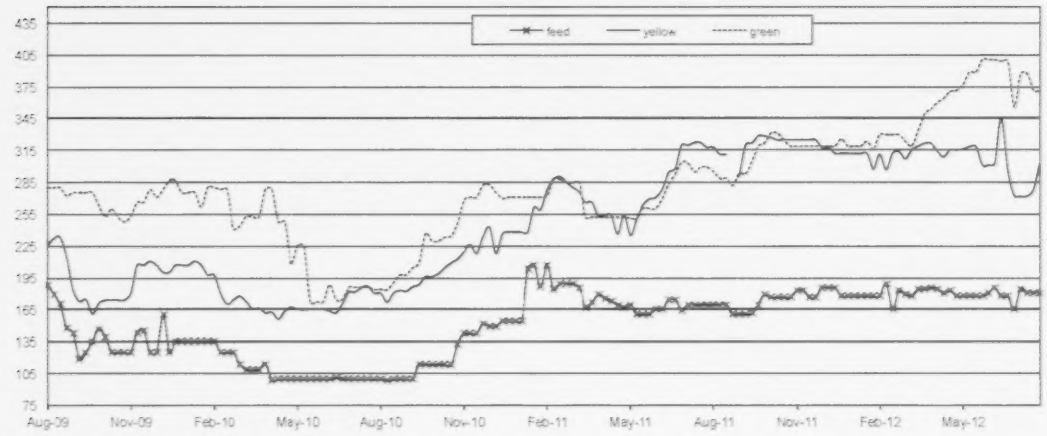
Figure 5: Pea Seeded Acres by Crop District, 2011



Source: Statistics Canada

Figure 6: Saskatchewan Green, Yellow and Feed Pea Spot Price

Delivered Plant ($/tonne)



Source: Saskatchewan Ministry of Agriculture

Feed Peas

Saskatchewan production of 'other pea', which included marrow fat peas and maple peas, is estimated to be 13,600 tonnes, down five per cent from 2011. Yields averaged 1,500 pounds per acre, down five per cent from 2011.

The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was $170 per tonne. The spot fell through August and September to $161 per tonne, then the spot price generally rose to $186 per tonne by mid-December, fell for a few weeks, then was variable, reaching a high of $189 per tonne in early February, more variability to $186 per tonne by mid-June and was at $181 per tonne at the end of July 2012. The cash/spot price for the past three crop years is shown in Figure 6.

Canadian exports of all peas were three million tonnes in 2010/11 and fell by 30 per cent to 2.1 million tonnes in 2011/12. Figure 7 shows the Canadian exports of all peas to different regions of the world. In 2011, Saskatchewan was responsible for 53 per cent of the quantity of the peas exported in the world.

Figure 8 shows the supply and disposition of peas in Western Canada. The figure shows that the ending stocks to use ratio was at 10 per cent in the 2011/12 crop year, and is estimated to rise to 11 per cent by the end of the 2012/13 crop year due to higher production and lower exports in 2012/13.

Figure 7: Canadian Dry Peas Exports

Top 20 Destinations by Crop Year

	2010-2011	tonnes	2011-2012	tonnes
	World	3,015,491	World	2,098,929
1	India	1,708,418	India	917,965
2	China	514,676	China	651,302
3	Bangladesh	236,318	Bangladesh	156,357
4	Spain	95,287	Cuba	66,000
5	Pakistan	77,700	United States	57,509
6	Cuba	66,091	Indonesia	31,132
7	United Arab Emirates	45,285	Colombia	30,741
8	United States	38,047	Venezuela	23,411
9	Colombia	23,557	Philippines	19,755
10	Venezuela	19,632	United Arab Emirates	19,264
11	Philippines	14,459	Spain	13,910
12	Turkey	13,406	Peru	13,808
13	Peru	12,144	Taiwan	10,899
14	Taiwan	11,832	Mexico	7,545
15	South Africa	9,712	Japan	6,383
16	Brazil	9,111	Yemen	6,053
17	Mexico	8,916	South Africa	5,283
18	Egypt	5,951	Brazil	4,426
19	Algeria	5,944	Saudi Arabia	3,674
20	Yemen	5,936	Nepal	3,601

Source: Statistics Canada

Figure 8: Pea Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	'000 tonnes	'000 acres				'000 tonnes					
2004/05	200.0	3,074.0	3,097.2	57.3	3,354.5	1,853.0	23.0	219.3	786.2	473.0	16%
2005/06	473.0	3,130.0	2,993.6	75.3	3,541.9	2,567.4	23.0	212.2	376.3	363.0	11%
2006/07	363.0	3,041.0	2,519.9	59.9	2,942.8	1,969.2	23.0	247.0	536.6	167.0	6%
2007/08	167.0	3,565.0	2,934.8	37.6	3,139.4	2,201.6	23.0	271.8	388.0	255.0	9%
2008/09	255.0	3,895.0	3,564.5	18.4	3,837.9	2,819.8	25.0	264.4	283.7	445.0	13%
2009/10	445.0	3,675.0	3,379.4	46.1	3,870.5	2,196.3	25.0	255.0	484.2	910.0	31%
2010/11	910.0	3,432.0	3,018.2	42.8	3,971.0	3,015.2	25.0	171.0	224.8	535.0	16%
2011/12	535.0	2,407.0	2,502.0	30.4	3,067.4	2,098.9	27.7	235.0	430.8	275.0	10%
2012/13	275.0	3,239.0	2,829.7	30.8	3,135.5	2,335.0	25.9	220.0	244.6	310.0	11%

* Feed, waste and dockage
Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research.

Lentils

For 2012, the estimated total lentil production in Saskatchewan is 1.4 mmt, which is down three per cent from 2011. The decrease in lentil production was a result of decreased acres and a lower yield. In 2012 the estimated seeded area for all lentils was 2.4 million acres, down one per cent from 2011. The provincial lentil yield in 2012 averaged 1,306 pounds per acre, a four per cent decrease from the 2011 yield and 11 per cent above the 10-year provincial average. A summary of the production and prices for all lentils in the past ten years is shown in Figure 9. In 2012, the lentil crop is expected to grade 78 per cent in the top two grades, compared to the 10-year average of 70 per cent.

Figure 10 shows the acres seeded to lentils by crop district in 2011. The data is not yet available by crop district for 2012. Districts with the highest seeded acres in 2011 were 3bn with 444,651, 7a with 422,198, and 3an with 261,950 seeded acres – the same top three as in 2010.

Large Green Lentils

Saskatchewan large green lentil production is estimated to be 691,900 tonnes in 2012, up 19 per cent from 2011. Harvested acres increased by 20 per cent from 2011. Yields averaged 1,293 pounds per acre, down one per cent from 2011.

The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was 33.2¢ per pound. The spot price fell to 29.7¢ per pound by mid-October, fell, rallied a bit but dropped to 24.5¢ per pound by late March, rallied a bit again but dropped to 21.3¢ per pound by the end of July 2012. The cash/ spot price for the past three crop years is shown in Figure 11.

Small Green Lentils

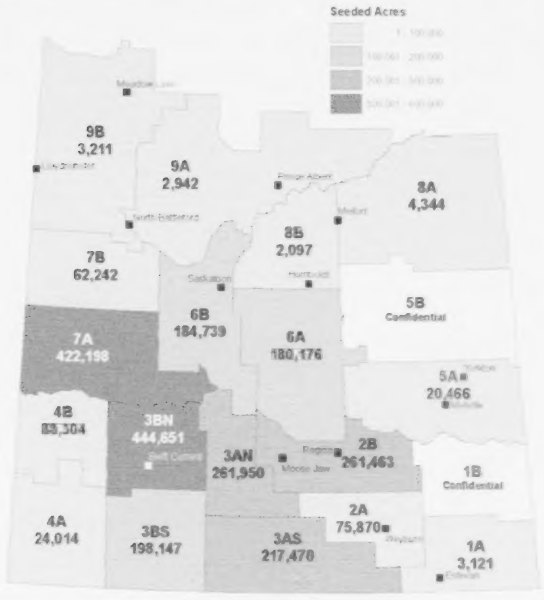
Saskatchewan small green lentil production is estimated to be 157,800 tonnes in 2012, up 40 per cent from 2011 production. Harvested acres increased by 31 per cent from 2011 and yields averaged 1,364 pounds per acre, up seven per cent from last year.

Figure 9: Lentil Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (lbs/acre)	Production (tonnes)	Average Price ($/tonne)
2002/03	1,320	817	326,100	450
2003/04	1,250	862	475,000	423
2004/05	1,800	1,143	902,700	368
2005/06	1,960	1,320	1,150,200	249
2006/07	1,400	1,115	692,800	296
2007/08	1,435	1,136	733,900	503
2008/09	1,745	1,330	1,043,200	754
2009/10	2,355	1,413	1,496,800	661
2010/11	3,340	1,282	1,840,300	497
2011/12	2,460	1,359	1,455,000	474
2012/13	2,430	1,306	1,407,300	

Source: Statistics Canada

Figure 10: Lentil Seeded Acres by Crop District, 2011



Source: Statistics Canada
Confidential Data withheld because of small sample size

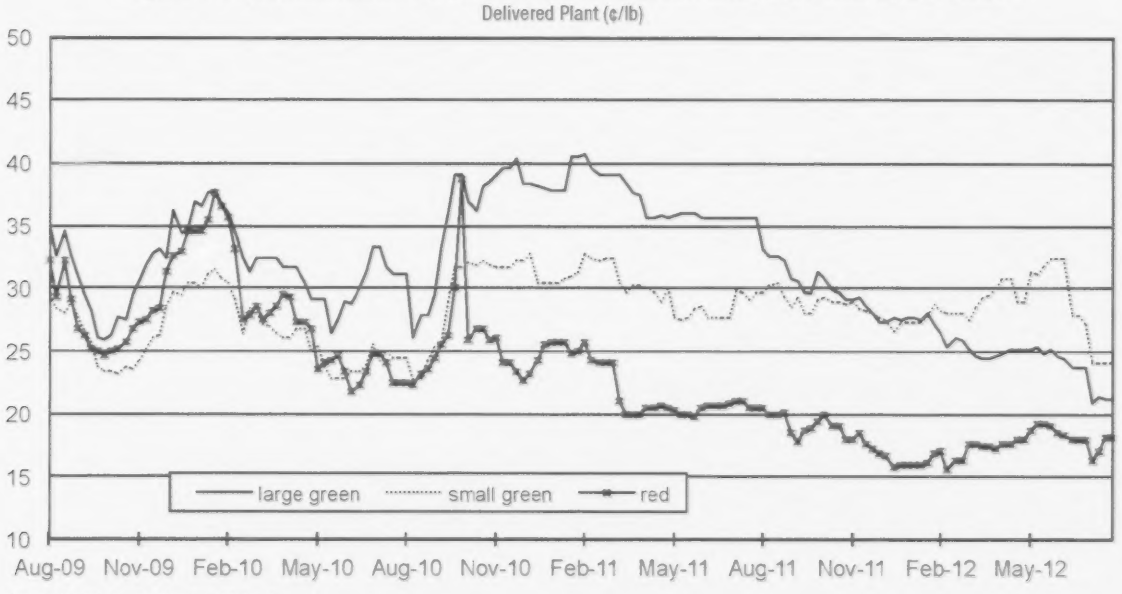
The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was 29.7¢ per pound. The spot price then varied but fell to 26.7¢ per pound by mid-December, rose to 32.4¢ per pound by late May, and fell to 24.2¢ per pound by the end of July 2012. The cash/spot price for the past three crop years is shown in Figure 11.

Red Lentils

Saskatchewan red lentil production is estimated to be 522,600 tonnes in 2012, down by 29 per cent from 2011. In 2012, 870,000 acres of red lentil were harvested, down 23 per cent from 2011. Yields averaged 1,324 pounds per acre, down eight per cent from the 1,436 pounds per acre in 2011.

The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was 20.5¢ per pound. The spot price fell to 17.9¢ per pound by early September, rose to 20.0¢ by the beginning of October, generally fell to 15.8¢ per pound by mid-December, rose to 19.3¢ per pound by early May, and fell to 18.2¢ per pound by the end of July 2012. The cash/spot price for the past three crop years is shown in Figure 11.

Figure 11: Saskatchewan Large Green, Small Green and Red Lentil Spot Prices



Source: Saskatchewan Ministry of Agriculture

Figure 12: Canadian Lentil Exports

	Top 20 Destinations by Crop Year 2010-2011		2011-2012	
		tonnes		tonnes
	World	1,105,894	World	1,147,833
1	Turkey	240,206	Turkey	206,308
2	India	135,103	India	169,504
3	Algeria	73,879	United Arab Emirates	83,483
4	Egypt	70,382	Pakistan	68,527
5	United Arab Emirates	69,422	Colombia	65,226
6	Pakistan	56,743	Egypt	64,905
7	Colombia	56,287	Algeria	63,564
8	Sri Lanka	52,799	Bangladesh	47,627
9	Venezuela	36,210	Venezuela	40,609
10	Bangladesh	34,231	Spain	40,487
11	Mexico	31,613	Mexico	40,264
12	Spain	28,866	Peru	30,172
13	Peru	20,717	United States	27,480
14	Italy	19,061	Italy	22,652
15	Ecuador	18,605	Chile	15,956
16	Chile	14,230	Ecuador	15,513
17	Brazil	12,535	Sri Lanka	14,715
18	United States	12,545	Germany	11,458
19	Germany	11,652	Brazil	11,217
20	United Kingdom	10,292	United Kingdom	11,196

Source: Statistics Canada

Other Lentils

'Other lentils' include medium green and French green varieties. Saskatchewan 'other lentils' production is estimated to be 34,900 tonnes in 2012, up by 25 per cent from 2011. In 2012, 70,000 acres of 'other lentils' were harvested, up 27 per cent from 2011. 'Other lentils' yields averaged 1,100 pounds per acre, down two per cent from 2011.

At the end of July 2012, the spot price for medium green lentils was 19.4¢ per pound and the spot price for French green lentils was 27.6¢ per pound.

Canadian exports of all lentils were 1.11 million tonnes in 2010/11 but increased by four per cent to 1.15 million tonnes in 2011/12. Figure 12 shows the Canadian exports of all lentils to different regions of the world. In 2011, Saskatchewan accounted for 58 per cent of the tonnage of world lentil exports.

Figure 13 shows the supply and disposition of lentils in Western Canada. The table shows that the ending stocks to use ratio was 43 per cent in the 2011/12 crop year and is estimated to drop in the 2012/13 crop year due to a slight decrease in production and an increase in exports.

Figure 13: Lentil Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	000 tonnes	'000 acres				'000 tonnes					
2004/05	33.0	1,765.0	915.8	10.0	963.8	450.9	4.0	67.5	199.4	242.0	34%
2005/06	242.0	1,940.0	1,164.3	7.6	1,413.9	671.3	4.0	47.6	206.0	485.0	52%
2006/07	485.0	1,370.0	692.8	12.8	1,190.6	851.7	4.0	48.8	87.1	199.0	20%
2007/08	199.0	1,425.0	733.9	8.8	941.7	810.5	4.0	59.4	21.8	46.0	5%
2008/09	46.0	1,730.0	1,043.2	3.1	1,092.3	973.3	6.9	79.2	10.9	22.0	2%
2009/10	22.0	2,385.0	1,530.2	7.2	1,559.4	1,387.2	10.0	102.2	20.0	40.0	3%
2010/11	40.0	3,265.0	1,919.6	27.8	1,987.4	1,105.9	10.0	87.3	66.2	718.0	57%
2011/12	718.0	2,455.0	1,523.3	27.8	2,269.1	1,147.8	10.2	88.0	340.1	683.0	43%
2012/13	683.0	2,456.0	1,472.8	7.3	2,163.1	1,278.2	10.4	77.0	175.5	622.0	40%

* Feed, waste and dockage

Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research.

Mustard

For 2012, the estimated total mustard production in Saskatchewan is 82,700 tonnes, down 20 per cent from 2011 mustard production. The decrease in production was a result of fewer seeded acres and lower yields. In 2012 the estimated seeded area for all mustard was 240,000 acres, down nine per cent from 2011. The provincial average yield in 2012 was 760 pounds per acre, down 15 per cent from the 2011 yield, and nine per cent above the 10-year provincial average. In 2012, the crop is expected to grade 83 per cent No. 1 Canada, above the 10-year average of 70 per cent. A summary of the production and prices for all mustard in the past ten years is shown in Figure 14.

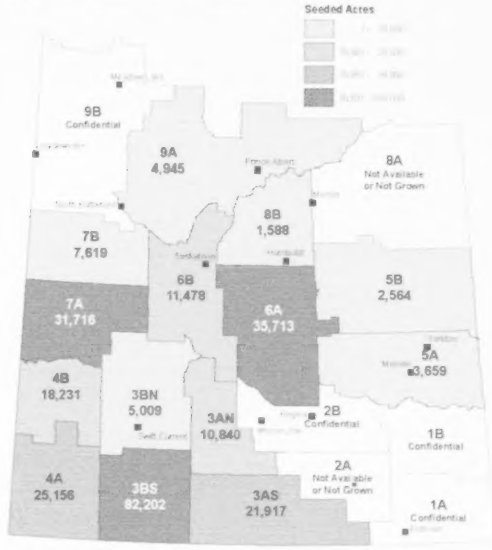
Figure 14: Mustard Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (lbs/acre)	Production (tonnes)	Average Price ($/tonne)
2002/03	600	521	125,200	500
2003/04	675	600	176,900	464
2004/05	600	898	232,800	389
2005/06	400	863	152,700	300
2006/07	268	700	82,600	356
2007/08	375	560	95,300	689
2008/09	370	770	123,900	930
2009/10	405	885	160,600	660
2010/11	370	846	134,300	537
2011/12	265	892	103,200	654
2012/13	240	760	82,700	

Source: Statistics Canada

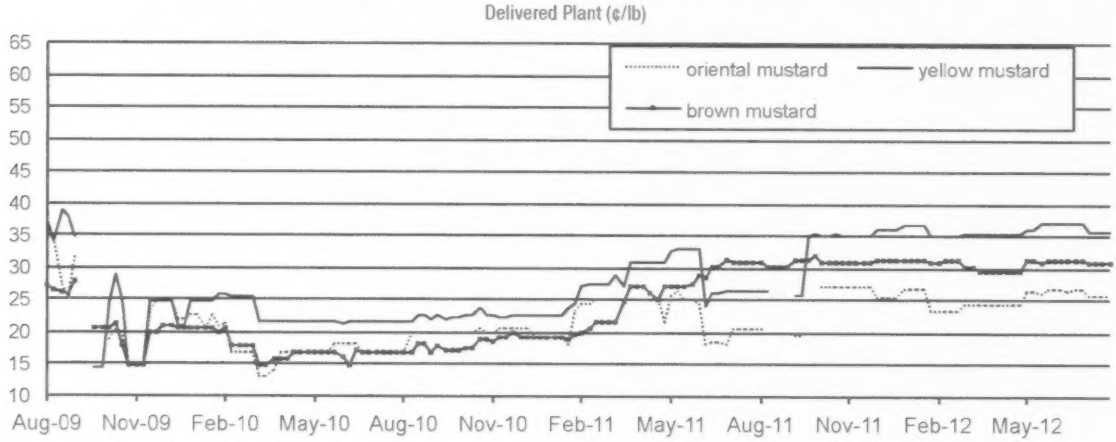
Figure 15 shows the acres seeded to by crop district in 2011. The data is not yet available by crop district for 2012. Districts with the highest seeded acres in 2011 were 3bs with 82,202, 6a with 35,713, and 7a with 31,716 seeded acres. Crop district 3as was in the top three instead of 6a in 2010.

Figure 15: Mustard Seeded Acres by Crop District, 2011



Source: Statistics Canada

Figure 16: Saskatchewan Brown, Yellow and Oriental Mustard Spot Price



Source: Saskatchewan Ministry of Agriculture

Figure 17: Canadian Mustard Exports

Top 20 Destinations by Crop Year

	2010-2011		2011-2012
	tonnes		tonnes
	World	123,651	World	115,187
1	United States	66,428	United States	61,716
2	Belgium	22,203	Belgium	19,357
3	Japan	5,550	Germany	7,918
4	Germany	4,989	Japan	5,247
5	Netherlands	4,035	Thailand	3,688
6	Thailand	2,995	Netherlands	2,608
7	Venezuela	2,106	Korea, South	2,010
8	Senegal	1,970	Senegal	1,706
9	Korea, South	1,921	Venezuela	1,561
10	Switzerland	1,768	Switzerland	1,437
11	France	1,559	Brazil	896
12	Australia	950	Australia	881
13	India	888	United Kingdom	716
14	United Kingdom	792	France	690
15	Brazil	710	Peru	597
16	Morocco	618	Ecuador	486
17	Ecuador	610	Greece	351
18	Finland	387	Guatemala	337
19	Greece	381	Finland	330
20	Peru	349	India	310

Source: Statistics Canada

Yellow Mustard

Saskatchewan yellow mustard production is estimated to be 39,900 tonnes in 2012, up 17 per cent from the 2011 production. Harvested acres increased by 37 per cent from 2011. Yields averaged 677 pounds per acre, down 15 per cent from 2011.

The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was 26.6¢ per pound. The spot price fell slightly in mid-August and reached 25.9¢ per pound by early September, rose to 36.7¢ by late December, fell to 35.2¢ by late February, and rose again to 37.2¢ by mid-May. It then started falling and was at 35.8¢ per pound by July 25, 2012. The cash/spot price for the past three crop years is shown in Figure 16.

Brown Mustard

Saskatchewan brown mustard production is estimated to be 25,100 tonnes in 2012. Production is down 36 per cent from the 2011 production. Harvested acres decreased by 28 per cent from 2011. Yields averaged 851 pounds per acre, down 11 per cent from 2011.

The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was 31.1¢ per pound. The spot price fell to 30.4¢ per pound in mid-August, rose to 31.4¢ per pound in late November, fell to 29.4¢ per pound by mid- March, and was up to 31.1¢ per pound by July 27, 2012. The cash/spot price for the past three crop years is shown in Figure 16.

Figure 18: Mustard Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	'000 tonnes	'000 acres	'000 tonnes								
2004/05	90.1	703.0	286.7	1.3	378.1	119.0	19.8	2.2	46.0	191.1	102%
2005/06	191.1	390.0	183.8	0.2	375.1	133.2	18.0	1.5	32.3	190.1	103%
2006/07	190.1	260.0	108.2	1.3	299.6	152.9	20.5	2.1	33.0	91.1	44%
2007/08	91.1	460.0	124.8	0.4	216.3	168.2	8.0	2.2	10.9	27.0	14%
2008/09	27.0	460.0	161.1	0.9	189.0	130.9	3.6	2.5	10.0	42.0	29%
2009/10	42.0	515.0	208.3	0.3	250.6	128.0	13.7	2.2	24.7	82.0	49%
2010/11	82.0	450.0	182.0	0.5	264.5	123.7	10.0	1.8	13.0	116.0	78%
2011/12	116.0	317.5	130.0	0.2	246.2	115.2	31.1	1.5	15.4	83.0	51%
2012/13	83.0	260.0	118.6	0.1	201.7	125.0	17.5	1.7	13.0	44.5	28%

* Feed, waste and dockage

Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research.

Oriental Mustard

Saskatchewan oriental (and non-specified) mustard production is estimated to be 17,700 tonnes in 2012, down 41 per cent from 2011. Harvested acres decreased by 36 per cent from 2011. Yields averaged 867 pounds per acre, down nine per cent from 2011.

The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was 20.7¢ per pound. The spot price rose to 26.4¢ per pound by mid-August, fell, and then rose again to 27.3¢ in early October, dropped to 23.4¢ per pound by late January and started rising again to close the crop year at 25.7¢ per pound in July 2012. The cash/spot price for the past three crop years is shown in Figure 16.

Canadian exports of all mustard were 123,651 tonnes in 2010/11 and decreased by seven per cent to 115,187 tonnes in 2011/12. Figure 17 shows the Canadian exports of all mustard to different regions of the world. In 2011, Saskatchewan was responsible for 24 per cent of the quantity of the world's mustard seed exports.

Figure 18 shows the supply and disposition of all mustard in Western Canada. The figure shows that the stocks to use ratio was 51 per cent in the 2011/12 crop year and is estimated to drop to 28 per cent by the end of the 2012/13 crop year due to lower production and increased exports.

Canaryseed

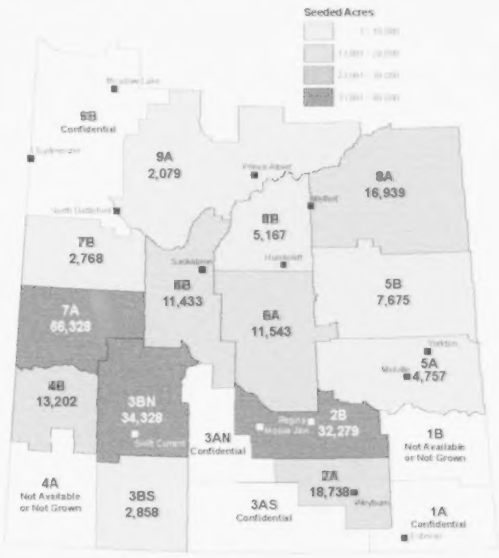
For 2012, the estimated total canaryseed production in Saskatchewan is 124,900 tonnes, which is down three per cent from 2011. The decline in canaryseed production was a result of a decline in yields. In 2012 the estimated seeded area was 300,000 acres, up nine per cent from 2011. The 2012 provincial yield averaged 966 pounds per acre, down eight per cent from 2011 and up three per cent from the 10-year provincial average. A summary of the production and prices for canaryseed in the past ten years is shown in Figure 19.

Figure 19: Canaryseed Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (lbs/acre)	Production (tonnes)	Average Price ($/tonne)
2002/03	580	699	142,400	644
2003/04	570	782	198,700	379
2004/05	820	836	284,400	268
2005/06	435	1,099	219,300	201
2006/07	326	904	129,100	333
2007/08	425	827	155,700	525
2008/09	390	1,071	184,600	498
2009/10	355	1,224	188,700	402
2010/11	365	890	143,200	546
2011/12	275	1,050	128,600	592
2012/13	300	966	124,900	

Source: Statistics Canada

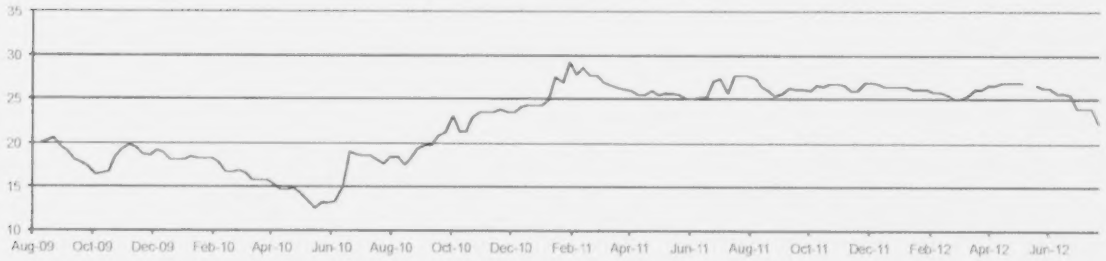
Figure 20: Canaryseed Seeded Acres by Crop District, 2011



Source: Statistics Canada
Confidential Data withheld because of small sample size

Figure 21: Saskatchewan Canaryseed Spot Price

Delivered Plant (¢/lb)



Source: Saskatchewan Ministry of Agriculture

Figure 22: Canadian Canaryseed Exports

Top 20 Destinations by Crop Year

	2010-2011		2011-2012
	tonnes		tonnes
	World 178,860	World	126,386
1	Mexico 58,949	Belgium	25,339
2	Belgium 34,719	Mexico	22,665
3	United States 14,078	United States	10,559
4	Spain 10,623	Spain	9,672
5	Colombia 9,969	Colombia	8,809
6	Brazil 8,803	Italy	5,354
7	Italy 5,983	Venezuela	4,171
8	Venezuela 5,303	Portugal	4,170
9	Peru 4,160	Peru	4,165
10	Portugal 4,066	Brazil	3,482
11	Chile 2,176	Chile	2,598
12	Syria 1,489	Algeria	2,458
13	Guatemala 1,273	Turkey	2,301
14	Ecuador 1,236	Indonesia	2,111
15	Indonesia 1,027	Egypt	1,886
16	Greece 1,128	Ecuador	1,545
17	Algeria 1,099	Tunisia	1,504
18	Tunisia 1,067	UAE	1,445
19	Turkey 995	Morocco	1,054
20	Malta 986	Syria	997

Source: Statistics Canada

Figure 20 shows the acres seeded to canaryseed by crop district in 2011. The data is not yet available by crop district for 2012. Districts with the highest seeded acres in 2011 were 7a with 66,328, 3bn with 34,328 and 2b with 32,279 seeded acres. Last year crop district 2a had more acres planted to canaryseed than 3bn did.

The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was 27.6¢ per pound. The spot price fell to 25.3¢ per pound by late August, rose to 26.9¢ per pound by late November, fell to 25.0¢ per pound by late February, rose again to 26.9¢ per pound by early May. The spot price then started falling and was 22.3¢ per pound by the end of July 2012. The cash/spot price for the past three crop years is shown in Figure 21.

Sixty-three per cent of the seeded area was to regular canaryseed, while 37 per cent was to hairless canaryseed. Regular canaryseed out-yielded hairless canaryseed by three per cent.

Canadian exports of canaryseed were 178,860 tonnes in 2010/11 and decreased by 29 per cent to 126,386 tonnes in 2011/12. Figure 22 shows the Canadian exports of all canaryseed to different regions of the world. In 2011, Saskatchewan was responsible for 69 per cent of the tonnage of the world canaryseed exports.

Figure 23 shows the supply and disposition of canaryseed in Western Canada. The figure shows that the ending stocks to use ratio was down to 12 per cent in the 2011/12 crop year but is estimated to rise to 16 per cent by the end of the 2012/13 crop year due mainly to continued export impediments.

Figure 23: Canaryseed Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	'000 tonnes	'000 acres	'000 tonnes								
2004/05	67.0	785.0	300.5	-	367.5	163.1	5.0	8.0	23.4	168.0	84%
2005/06	168.0	450.0	227.2	-	395.2	185.2	5.0	5.9	9.1	190.0	93%
2006/07	190.0	324.0	133.1	-	323.1	177.9	5.0	7.7	12.5	120.0	59%
2007/08	120.0	430.0	162.5	-	282.5	204.2	2.0	7.3	4.0	65.0	30%
2008/09	65.0	400.0	195.0	-	260.0	152.6	5.0	6.5	18.9	77.0	42%
2009/10	77.0	355.0	197.4	-	274.4	181.3	5.0	6.9	12.2	69.0	34%
2010/11	69.0	380.0	153.5	-	222.5	178.9	3.0	4.1	6.5	30.0	16%
2011/12	30.0	270.0	128.6	-	158.6	126.4	4.0	4.1	7.1	17.0	12%
2012/13	17.0	285.0	124.9	-	141.9	108.1	4.0	3.9	5.9	20.0	16%

* Feed, waste and dockage
Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research

Chickpeas

For 2012, the estimated total chickpea production in Saskatchewan is 141,300 tonnes, up 88 per cent from 2011 production. In 2012 the estimated seeded area for all chickpeas was 180,000 acres, up 71 per cent from 2011. The provincial chickpea yield in 2012 averaged 1,781 pounds per acre, up 11 per cent from 2011 and 36 per cent above the 10-year provincial average. In 2012, the crop is expected to grade 44 per cent No. 1 CW versus the 10-year average of 41 per cent. A summary of the production and prices for all chickpeas in the past ten years is shown in Figure 24.

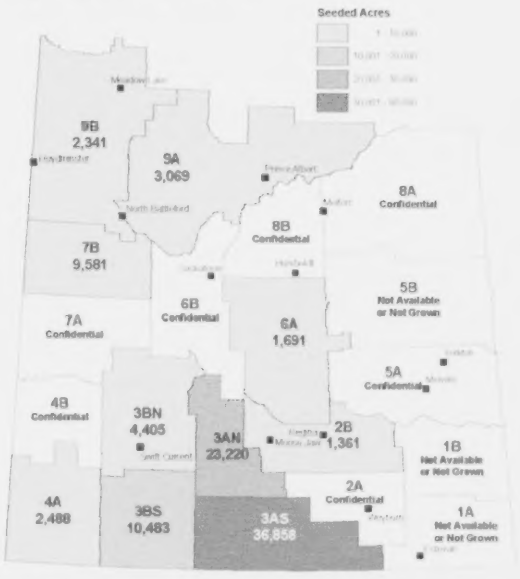
Figure 25 shows the acres seeded to chickpeas by crop district in 2011. The data is not yet available by crop district for 2012. Districts with the highest seeded acres in 2011 were 3as with 36,858, 3an with 23,220 and 3bs with 10,483 seeded acres. Last year crop district 2b had more acres planted to chickpeas than 3bs did.

Figure 24: Chickpea Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (lbs/acre)	Production (tonnes)	Average Price ($/tonne)
2002/03	430	886	128,600	481
2003/04	130	923	54,400	492
2004/05	100	1,175	42,600	388
2005/06	165	1,240	84,300	455
2006/07	278	1,100	137,200	539
2007/08	380	1,149	198,100	546
2008/09	110	1,409	67,000	545
2009/10	80	1,689	57,400	583
2010/11	205	1,489	128,300	636
2011/12	105	1,610	75,200	750
2012/13	180	1,781	141,300	

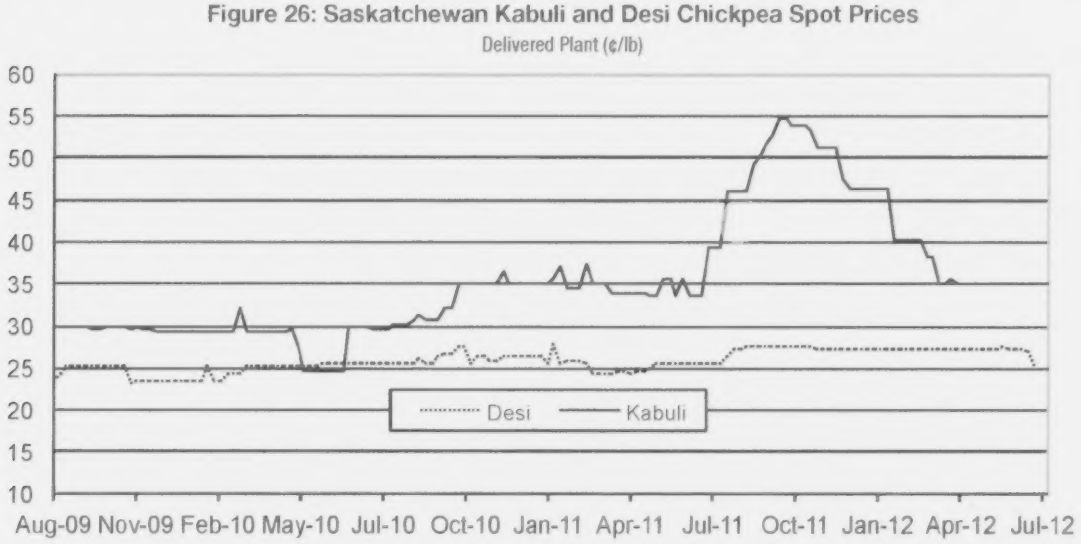
Source: Statistics Canada

Figure 25: Chickpea Seeded Acres by Crop District, 2011



Source: Statistics Canada
Confidential Data withheld because of small sample size

Figure 26: Saskatchewan Kabuli and Desi Chickpea Spot Prices



Source: Saskatchewan Ministry of Agriculture

Figure 27: Canadian Chickpea Exports

Top 20 Destinations by Crop Year

	2010-2011	tonnes	2011-2012	tonnes
	World	87,218	World	38,158
1	Turkey	19,535	United States	9,674
2	Jordan	12,221	Pakistan	4,177
3	United States	10,812	India	3,575
4	Pakistan	7,419	Jordan	3,154
5	Egypt	6,201	Turkey	2,798
6	Italy	3,616	United Arab Emirates	2,600
7	United Kingdom	3,348	United Kingdom	2,171
8	India	2,822	Italy	1,512
9	Spain	2,678	Israel	1,200
10	Israel	2,462	Trinidad & Tobago	1,118
11	Saudi Arabia	2,461	Egypt	1,064
12	Algeria	2,371	Lebanon	588
13	United Arab Emirates	1,999	Indonesia	550
14	Colombia	1,549	Colombia	518
15	Trinidad & Tobago	1,493	Spain	446
16	Portugal	1,422	Algeria	303
17	Lebanon	1,289	Portugal	299
18	Costa Rica	387	Venezuela	250
19	Venezuela	300	Netherlands	230
20	Belgium	276	Belgium	210

Source: Statistics Canada

Kabuli Chickpea

Saskatchewan Kabuli chickpea production is estimated to be 125,100 tonnes in 2012, up 167 per cent from 2011. In 2012, 155,000 acres of Kabuli chickpea were harvested, up 146 per cent from 2011. Yields averaged 1,779 pounds per acre, up eight per cent from 2011.

The spot price at Saskatchewan plants at the beginning of the 2011/12 crop year was 39.5¢ per pound. The spot price reached 54.7¢ per pound by early October, then began to fall and was 35.1¢ per pound by the end of July 2012. The cash/spot price for the past three crop years is shown in Figure 26.

Desi Chickpea

For 2012, the estimated Desi chickpea and "Other or Unspecified chickpeas" production in Saskatchewan is not available due to the unreliability of estimates because of the small sample size.

The spot price for Saskatchewan plants at the beginning of the 2011/12 crop year was 25.5¢ per pound. The spot price rose to 27.6¢ per pound by the beginning of October, then fell back to 27.2¢ per pound by mid-November and stayed there until mid-April when it rose slightly, but fell back to 25.1¢ per pound by the end of July 2012. The cash/spot price for the past three crop years is shown in Figure 26.

Canadian exports of chickpeas were 87,218 tonnes in 2010/11 and decreased by 56 per cent to 38,158 tonnes in 2011/12. Figure 27 shows the Canadian exports of all chickpeas to different regions of the world. In 2011, Saskatchewan was responsible for five per cent of the tonnage of world exports.

Figure 28 shows the supply and disposition of chickpeas in Western Canada. The figure shows that the ending stocks to use ratio was down to 11 per cent in the 2011/12 crop year and is estimated to rise to 36 per cent by the end of the 2012/13 crop year, due to increased production.

Figure 28: Chickpea Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	'000 tonnes	'000 acres	'000 tonnes								
2004/05	68.0	95.0	51.2	3.8	123.0	46.6	11.0	12.4	11.0	42.0	52%
2005/06	42.0	180.0	103.9	6.8	152.7	64.0	20.0	20.3	31.4	17.0	13%
2006/07	17.0	315.0	163.2	5.0	185.2	115.2	14.0	27.3	18.7	10.0	6%
2007/08	10.0	430.0	224.8	8.4	243.2	68.5	16.0	7.0	59.7	92.0	61%
2008/09	92.0	105.0	67.0	4.1	163.1	54.3	19.1	7.7	20.0	62.0	61%
2009/10	62.0	100.0	75.5	5.0	142.5	67.7	20.5	15.0	19.3	20.0	16%
2010/11	20.0	190.0	128.3	8.9	157.2	87.2	30.0	8.7	9.3	22.0	16%
2011/12	22.0	115.5	85.6	6.0	113.6	38.2	24.9	14.3	25.2	11.0	11%
2012/13	11.0	195.0	157.5	7.0	175.5	67.4	24.7	15.0	22.4	46.0	36%

* Feed, waste and dockage
Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research.

Other Crops

Triticale production is estimated at 16,500 tonnes, up 62 per cent from 2011 production of 10,200 tonnes. The increase is due to a 62 per cent increase in yield. The average yield for triticale was 2,425 pounds per acres. In 2012, 78 per cent of the triticale crop is expected to grade No. 1 Canada.

Coriander seeded area was down from 2011, with around 15,500 acres planted. In 2011/12, Canadian exports to the world totaled 939 tonnes. This was an 80 per cent decrease from the 4,594 tonnes exported in 2010/11. The United States was the main importer followed by Sri Lanka and the United Kingdom.

Caraway seeded area was estimated to be down compared to 2011, with 6,500 acres planted. In 2011/12, Canadian exports to the world totaled 173 tonnes. This was an 80 per cent decrease from the 867 tonnes exported in 2010/11. The United States and Mexico were the importers.

No camelina acres were contracted in 2012, and thus there were essentially no changes to acres planted, at less than 1,000 acres. Borage seeded area is estimated to be higher than in 2011, with 4,200 acres planted. Dry bean acreage is estimated to be slightly higher than 2011 at 11,000 acres planted. Soybean acreage is back up due to the southeast being able to plant more acres this spring, compared to last. Hemp acreage is estimated to be more than double what was planted in 2011. Faba bean acres are down by more than half from 2011, while fenugreek acreages are estimated to be slightly higher than the 2011 acreage.

Other crops grown include buckwheat, sunflowers and quinoa.

Figure 29: Prairie Provinces Specialty Crops Area, Production, and Canadian Exports

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Mustard										
					Seeded Area (thousand acres)					
Alberta	140.0	130.0			85.0	100.0	120.0	100.0	63.0	95.0
Saskatchewan	675.0	600.0	400.0	268.2	375.0	370.0	405.0	370.0	265.0	240.0
Manitoba	25.0	8.0								
Prairie Provinces	**840.0**	**738.0**	**400.0**	**268.2**	**460.0**	**470.0**	**525.0**	**470.0**	**328.0**	**335.0**
					Production (thousand tonnes)					
Alberta	38.8	51.2	31.1	25.6	29.5	37.2	47.7	47.7	26.8	35.9
Saskatchewan	176.9	232.8	152.7	82.6	95.3	123.9	160.6	134.3	103.2	82.7
Manitoba	10.4	2.7								
Prairie Provinces	**226.1**	**286.7**	**183.8**	**108.2**	**124.8**	**161.1**	**208.3**	**182.0**	**130.0**	**118.6**
					Canadian Exports					
	03/04	**04/05**	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	
'000 tonnes	121.2	119.0	133.2	153.0	168.2	130.9	128.0	123.7	115.2	
Chickpeas										
					Seeded Area (thousand acres)					
Alberta	25.0	15.0	30.0	40.7	50.0		25.0		12.5	20.0
Saskatchewan	130.0	100.0	165.0	278.2	380.0	110.0	80.0	205.0	105.0	180.0
Manitoba										
Prairie Provinces	**155.0**	**115.0**	**195.0**	**318.9**	**430.0**	**110.0**	**105.0**	**205.0**	**117.5**	**200.0**
					Production (thousand tonnes)					
Alberta	13.2	8.6	19.6	26.0	26.7		18.1		10.4	16.2
Saskatchewan	54.4	42.6	84.3	137.2	198.1	67.0	57.4	128.3	75.2	141.3
Manitoba										
Prairie Provinces	**67.6**	**51.2**	**103.9**	**163.2**	**224.8**	**67.0**	**75.5**	**128.3**	**85.6**	**157.5**
					Canadian Exports					
	03/04	**04/05**	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	
'000 tonnes	73.5	46.6	64.0	115.3	69.5	54.3	67.7	87.2	38.2	
Lentils										
					Seeded Area (thousand acres)					
Alberta	15.0	18.0	24.0				50.0	105.0	97.8	85.0
Saskatchewan	1,250.0	1,800.0	1,960.0	1,400.0	1,435.0	1,745.0	2,355.0	3,340.0	2,460.0	2,430.0
Manitoba	4.0	7.0								
Prairie Provinces	**1,269.0**	**1,825.0**	**1,984.0**	**1,400.0**	**1,435.0**	**1,745.0**	**2,405.0**	**3,445.0**	**2,557.8**	**2,515.0**
					Production (thousand tonnes)					
Alberta	6.9	11.3	14.1				33.4	79.3	68.3	65.5
Saskatchewan	475.0	902.7	1,150.2	692.8	733.9	1,043.2	1,496.8	1,840.3	1,455.0	1,407.3
Manitoba	2.7	1.8								
Prairie Provinces	**484.6**	**915.8**	**1,164.3**	**692.8**	**733.9**	**1,043.2**	**1,530.2**	**1,919.6**	**1,523.3**	**1,472.8**
					Canadian Exports					
	03/04	**04/05**	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	
'000 tonnes	367.1	450.9	671.3	851.7	810.5	973.3	1,387.6	1,105.9	1,147.8	

Figure 29: Prairie Provinces Specialty Crops Area, Production, and Canadian Exports

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Peas										
					Seeded Area (thousand acres)					
Alberta	600.0	640.0	555.0	587.3	610.0	710.0	800.0	935.0	706.7	960.0
Saskatchewan	2,145.0	2,375.0	2,550.0	2,430.5	2,925.0	3,165.0	2,875.0	2,610.0	1,700.0	2,325.0
Manitoba	135.0	150.0	110.0	91.4	95.0	110.0	85.0	80.0	30.0	55.0
Prairie Provinces	**2,880.0**	**3,165.0**	**3,215.0**	**3,109.2**	**3,630.0**	**3,985.0**	**3,760.0**	**3,625.0**	**2,436.7**	**3,340.0**
					Production (thousand tonnes)					
Alberta	491.3	642.3	617.5	552.6	527.5	731.4	666.7	982.5	805.6	1,036.8
Saskatchewan	1,292.7	2,291.5	2,313.4	1,861.5	2,309.6	2,725.6	2,612.7	1,973.1	1,671.1	1,733.7
Manitoba	137.4	160.0	56.9	103.5	97.7	107.5	100.0	62.6	25.3	59.2
Prairie Provinces	**1,921.4**	**3,093.8**	**2,987.8**	**2,517.6**	**2,934.8**	**3,564.5**	**3,379.4**	**3,018.2**	**2,502.0**	**2,829.7**
					Canadian Exports					
	03/04	**04/05**	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	
'000 tonnes	1,315.7	1,853.0	2,567.4	1,969.2	2,201.6	2,828.3	2,196.3	3,015.5	2,098.9	
Canaryseed										
					Seeded Area (thousand acres)					
Alberta	10.0	10.0								
Saskatchewan	570.0	820.0	435.0	326.2	425.0	390.0	355.0	365.0	275.0	300.0
Manitoba	60.0	30.0	20.0	9.0	15.0	20.0	15.0	30.0		
Prairie Provinces	**640.0**	**860.0**	**455.0**	**335.2**	**440.0**	**410.0**	**370.0**	**395.0**	**275.0**	**300.0**
					Production (thousand tonnes)					
Alberta	4.1	4.7								
Saskatchewan	198.7	284.4	219.3	129.1	155.7	184.6	188.7	143.2	128.6	124.9
Manitoba	31.8	11.4	7.9	4.0	6.8	10.4	8.7	10.3		
Prairie Provinces	**234.6**	**300.5**	**227.2**	**133.1**	**162.5**	**195.0**	**197.4**	**153.5**	**128.6**	**124.9**
					Canadian Exports					
	03/04	**04/05**	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	
'000 tonnes	164.7	163.1	185.2	177.9	204.3	152.6	181.4	178.9	126.4	

Source: Statistics Canada

For more information, contact:

Saskatchewan Agriculture Regional Offices

Kindersley
(306) 463-5513

Outlook
(306) 867-5575

Swift Current
(306) 778-8285

Watrous
(306) 946-3230

Moose Jaw
1-866-457-2377

Prince Albert
(306) 953-2363

Tisdale
(306) 878-8843

Weyburn
(306) 848-2857

North Battleford
(306) 446-7964

Yorkton
(306) 786-1531

Agriculture Knowledge Centre (Toll-Free): 1-866-457-2377

You may also contact us to make an appointment at one of our seven Regional Satellite Offices:

Assiniboia
1-866-457-2377

Lloydminster
(306) 446-7962

Moosomin
(306) 786-1531

Shaunavon
(306) 778-8285

Estevan
(306) 848-2857

Meadow Lake
(306) 446-7962

Wadena
(306) 946-3230

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